liveops

BACKGROUND

Liveops is a cloud-based virtual call center service headquartered in Scottsdale, Arizona. Founded in 2000, the company pioneered the virtual on-demand call center workforce and provides flexible and remote-friendly customer service. With Liveops, clients gain access to an on-demand network of experienced agents ready to provide virtual call center and customer service solutions.

CHALLENGE

In 2020, Liveops set out on a mission to create a single source of truth for its agent records, which cover 10,000 to 20,000 independent contractors depending upon the time of year. In the past, agent rosters, which include data such as contact information, clients they serve, and payment records, were located across disparate systems—from internal call center and client platforms to Google, Excel, and SharePoint.

As the company grew and began to serve larger, enterprise-level clients, they knew they needed a way to streamline and track their agent data in one central location. According to Denise Ortiz, Senior Manager, Solutions Services, "As we continued to grow, this thorn in our side became harder to ignore. We needed better insights into our agents to gain visibility into key areas such as the hiring, training, application, and production processes, as well as learning why agents stayed long- term versus what caused attrition."

Ortiz knew that they would never get over 20,000 agents by adding more support members to handle an ineffective system. "We want to retain our agents and keep them highly engaged. If we don't understand why they're leaving, we will never learn how to inspire them to stay."

SOLUTION/RESULTS

Ortiz and her team began searching for a solution and chose Salesforce as their platform of choice. "Our sales team was using Salesforce, but we knew that we would have to customize it extensively for our specific purposes," said Ortiz. "We had so much data that came from diverse sources and required a lot of integrations. There was no way we could do that ourselves—we needed a team of experts to help us." After a thorough search, Ortiz found Mastek Solutions (Mastek), a leading CRM and marketing automation consulting provider. "We were looking for a team that would be willing to work with our needs and potential complexities," she said. "Mastek was truly interested in what we were doing. They were willing to sit down with us to understand our challenges and goals, and create a solution that would work for our business."

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ELIMINATING BLIND SPOTS IN AGENT DATA

All Liveops agents are independent contractors and can choose which accounts they work on and how many. For example, an agent may choose to work with a retail client and an insurance client, which means they would be listed on two separate rosters. Because the accounts are managed by different teams, there was no way to know if an agent was working on multiple accounts.

"There was a blind spot in our analysis because we weren't tracking agents in the same system and had no way to truly compare data," explained Ortiz. "Bringing this all together in one system lets us see that an agent is working on two different business lines at the same time. This helps answer questions around their schedule and how productive they are on either account."

INSIGHTS INTO AGENT BEHAVIOR, REDUCING ATTRITION RATES

High attrition rates are common in the call center industry, and Liveops didn't have the data to understand the root cause of agent attrition. It's a highly competitive business environment as virtual call centers are an integral part of most industries today. "We didn't know if an agent was leaving the company, one account, or all of their accounts," said Ortiz. "We needed insights into our agent behavior in attrition, schedule, system access, and overall visibility."

This was a huge place of interest for Liveops as recruiting agents is time-consuming and expensive. Mastek created the Agent Record Center (ARC), the company's internal name for Salesforce Sales Cloud, which integrates with Liveops' application tracking system.

"Thanks to our new applicant tracking system, we can track the source of where our agents are coming from, whether they applied from Facebook or LinkedIn, and how that affects our attrition rate. The data is all integrated and will help us understand the importance of the source of our applicants, find the best agents, and reduce attrition rate."

> "Mastek took the time to truly understand our needs, and now we've been able to provide our company with a customized solution that's built for Liveops, not just for any call center."
>
> **Denise Ortiz**
> **Senior Manager, Solutions Services**

DATA DISCREPANCIES DROP TO ZERO

One of the challenges with disparate systems is the chance of human error that comes from manual entries. The business intelligence team, which was using Google Sheets for much of their client reporting, was experiencing about one discrepancy issue per week per client. It could be something as simple as a missing phone number or as complex as a duplicated agent ID with serious repercussions, such as payment mix-ups.

"Some of these disparities caused huge issues for us, for our clients, and our agents," said Ortiz. "By switching over to ARC as our data source, the issues have completely disappeared."

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SEAMLESS TECHNOLOGICAL ECOSYSTEM SAVES UP TO 6,000 WORK-HOURS PER YEAR

Liveops utilizes an agent invoicing portal where independent contractors can submit invoices for payment. However, due to time-consuming processes and time spent training on how to use the portal, payments were often delayed, sometimes for weeks.

"If there's a delay in getting signed up into the portal, then it backtracks everything," said Ortiz. "It was a huge pain point for our facilitators and agents. Imagine waiting to get paid because you haven't been able to log into a portal. It really brought down the agent experience."

With ARC, agents receive automated emails with links on how to sign up for their account and create their credentials without human intervention. "Everything is being done systematically. The seamless integration has created amnesty between our systems and makes our tech ecosystem a lot stronger," said Ortiz. "ARC helps agents navigate through the system, improving the agent experience and saving our team between 3,000 and 6,000 work-hours per year depending on the season," said Ortiz.

> "I want Mastek around forever. They've given me the biggest feather in my cap because this has been a painful problem for many years. I can say with confidence that this has made me and my team a lot more important and influential at Liveops because we provided a solution that works, something that improves people's experiences."
>
> **Denise Ortiz**
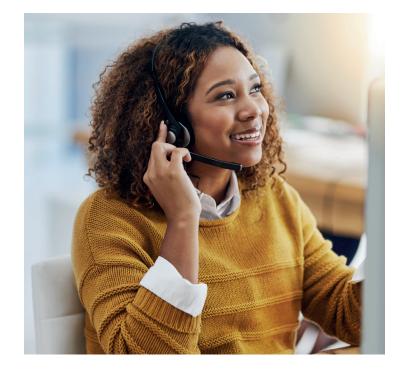> **Senior Manager, Solutions Services**

A DREAM COME TRUE — A SOLUTION THAT TRULY WORKS

"We were in desperate need of a single source of truth for many years, and it's finally here," said Ortiz. "Mastek took the time to truly understand our needs, and now we've been able to provide our company with a customized solution that's built for Liveops, not just for any call center."

Ortiz and her team are now working with Mastek to create an agent service desk in Salesforce. "My company has no concerns because as soon as I said, 'Oh yeah, my team from Mastek is going to build this,' there was a sigh of relief," concluded Ortiz. "I want Mastek around forever. They've given me the biggest feather in my cap because this has been a painful problem for many years. I can say with confidence that this has made me and my team a lot more important and influential at Liveops because we provided a solution that works, something that improves people's experiences."

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CHALLENGES

➢ Blind spots in data impacted ability to analyze agent behavior

➢ Potential of serious repercussions caused by data discrepancies

➢ Lack of visibility into root cause of agent attrition rates

➢ Time-consuming, manual processes

VALUE CREATED

➢ Healthy tech ecosystem with a single source of truth

➢ Freed up time and resources for higher leverage tasks

➢ Created automated processes, improved agent and facilitator experience

➢ Seamless integration with multiple platforms

SOLUTIONS

➢ Salesforce Service Cloud

➢ Salesforce Sales Cloud

➢ MuleSoft

ABOUT

Mastek is a turnkey & trusted Digital Engineering & Cloud Transformation partner that delivers Innovative Solutions and Business Outcomes for clients in Healthcare & Life Sciences, Retail, Manufacturing, Financial Services, Government/ Public Sector, etc. We enable customer success and business change programs by partnering with enterprises to unlock the power of data, modernize applications to the cloud, and accelerate digital advantage for all stakeholders. Customers Trust Mastek to deliver Business Value with Velocity and we operate in 40+ countries including the UK, Americas, Europe, Middle East, APAC with ~5000 employees. We are in the business of de-complexing Digital and making our clients future-ready with an industry-first approach. For more details, please visit our website **www.mastek.com.**

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